Marsh & McLennan Agency
PlanSource Elite Broker

PlanSource CoSource Partner

How We Work

MARSH & McLENNAN AGENCY

Marsh & McLennan Agency (MMA) is one of the nation's leading insurance brokerages, providing comprehensive risk management and employee benefit solutions to organizations of all sizes. MMA epitomizes the high-touch service model typical of a local consultant while providing access to the global resources of the world's leading insurance broker, Marsh.

MMA selected PlanSource – an industry leader in benefits administration – as its technology partner. Nearly 10,000 employers and 3.5 million consumers use PlanSource for benefits shopping, enrollment, billing, compliance and administration. MMA has been trained and certified to implement and support its clients on the PlanSource system.

PLANSOURCE

PlanSource's Elite Partner program is designed to maintain a strong business relationship with the top insurance brokers in the country, leading to direct pricing and service advantages for those brokers' clients. PlanSource is dedicated to creating a better benefits experience.

An Investment in PlanSource Delivers Benefits

Automate Processes

Engage Employees

Maintain Control

Ensure Compliance

Keep Accurate

What Makes PlanSource the Best?

Flexible System
That supports multiple employee populations and complex business rules
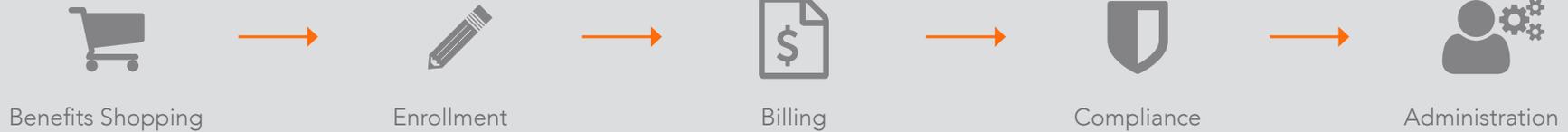
Strong Partnerships
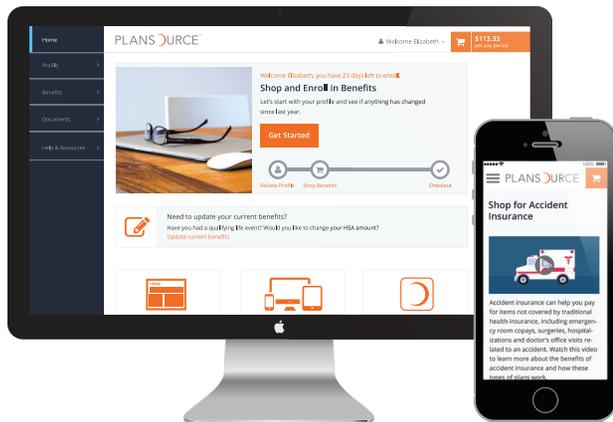With carriers that provide financial credits making PlanSource an affordable choice

Proven Technology
That provides a compliant and secure solution that scales for small and large employers

PlanSource Offers the Best Experience For

Benefits Shopping → Enrollment → Billing → Compliance → Administration

A Mobile-Friendly Employee Experience

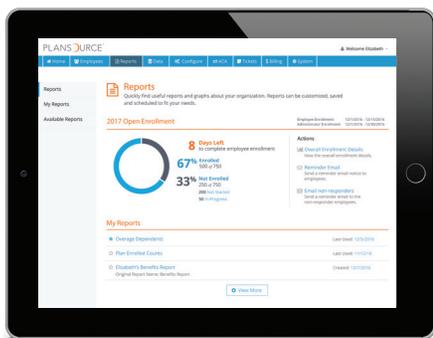**People-Friendly Experience**

Tailor-Made Recommendations

Shopping Cart and Checkout

Educational Videos and Content

Sophisticated Benefits Administration and Automation

Eligibility Management

Open Enrollment and Life Events

Employee Communications

Cost Calculations

Flexible Reporting

Data Exchange with Carriers